SUMMARY for

T	A	M
RAINING IN	DMINISTRATIVE	ANAGEMENT

U.S.D.A.,
DENVER, COLO.,

FEB. 12, 13, 14, 19, 20, & 21, 1952,

NAME .....

ORGANIZATION .....

"I am pleased with the steps you folks have taken in the Denver area to improve management techniques of Department officials. You have prepared an excellent workbook, and the program should prove most helpful to the fine group of participants. I am very much impressed with the Department-wide participation in planning your session and the good cross-section of those who are attending. All Department agencies working together as you folks are on this program, aiming toward better management, is the kind of unified effort needed to improve continually the Department's service to the public."

Charles F. Brannan
Secretary of Agriculture

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ACKNOWLEDGMENTS

The planning and staging of this workshop was the cooperative endeavor of all the bureaus and offices of the Department of Agriculture in the Denver area.

Edward P. Cliff, then Regional Forester, called the first meeting of the heads of offices and agencies and his work with this group established the basic plans and framework.

A steering committee initially headed by Mr. Cliff and later by William B. O'Rourke, Personnel Officer, Farmers Home Administration, Area Finance Office did the actual development work. This group was composed of:

William B. O'Rourke, FHA, Chairman
Dorothy G. Montgomery, FHA
G. A. Wright, FHA
G. E. McCrimmon, SCS
Dewey J. Harman, PMA
Curtis Hicks, FCIC
L. G. Whipple, FS
Clayton Weaver, FS

Three members of this committee, Mrs. Montgomery, Mr. Weaver, and Mr. O'Rourke gave the committee the benefit of a considerable amount of experience obtained at the 1951 leadership institute staged in Denver by Dr. E. R. Draheim, Office of Personnel, U. S. Department of Agriculture.

Special mention is made here of the invaluable assistance provided in actual planning and staging given by Dr. Albert H. Rosenthal, Director of the School of Public Administration, University of Denver. Dr. Rosenthal worked with members of the committee throughout the entire development and staging period. Hollis Bach, his assistant, also worked with the committee. He prepared the bibliography and made numerous suggestions on the arrangements, staging and planning.

Robert F. Leonard, an employee of the Area Finance Office, Farmers Home Administration, served as conference manager. His work in assisting with the arrangement and handling of conference business during the six days of sessions was outstanding. Working with him were a number of employees in the Area Finance Office who provided typing, information, reservations and other services which made a real contribution to the success of the workshop.

Reference materials were provided by the University of Denver Library, Library of the City and County of Denver, U. S. Forest Service Library and the Branch Library of the U.S. Department of Agriculture at Albuquerque, New Mexico. The Office of Personnel, U.S. Department of Agriculture supplied materials on management subjects for distribution to workshop participants.

By the committee on preparation and distribution of the workshop summary,

Emil H. Pubols, FHA, Chairman
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Hotel to Ogden

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Denver, Colorado February 1952

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PURPOSES AND OBJECTIVES-PLAN OF CONFERENCE

By Dorothy G. Montgomery, Administrative Officer, Farmers Home Administration, Denver, Colorado

Summary: Lewis G. Chipple, Forest Service, Denver, Colorado

SUMMARY

Mrs. Montgomery opened her remarks with the statement that this TAM session was part of a carefully drawn plan in accordance with a memorandum to the heads of all Bureaus in the Department by Secretary Brannan. In part, it read as follows: "As a part of the general project for the improvement of the administration, it is felt desirable to establish a program of in-service training of men and women who show aptitude and promise in the several functions constituting the field of administrative management".

Secretary Brannan established a committee on TAM in the Department and, as a result, three TAM Institutes and several workshops have been held. The first TAM Institute held in the West was in Denver last April, and, as a result we have this current TAM workshop.

The Department and the heads of your agencies hope that this TAM workshop will accomplish the following purposes:

1. That it will result in improved performance of people already in key positions.

2. That it will give a broader scope and a better understanding of the basic functions of government.

3. That it will develop well-trained and thoroughly rounded employees to serve in administrative and supervisory positions of even higher level.

4. That it will spread abroad a broader concept of government service, realizing that our accomplishments in the end can be measured only by the real service we have given to the people.

The men participating in the workshop were selected by their agency heads because they occupy responsible positions, had ability to grasp and maintain the high level of instruction to be given and because their boss felt confident that they, and the agency, will derive real benefit from the opportunity to hear and to get acquainted with recognized leaders in administrative management. Special emphasis was placed on the opportunity of asking questions of the speakers and to bring out in general discussions the problems connected with program operations.

Special encouragement was given to the full use of the workbook which had been given each agency participant and the use of questions in developing discussions. The primary point for each participant to keep in mind was the

question, "How can I put this into effect in my own job--in my agency--in my contacts with co-workers--in my contacts with the people I am trying to serve?" The workshop Steering Committee made a sincere effort to obtain outstanding speakers for the sessions. They would merit the close attention of every participant as well as active participation in the discussion periods following each presentation.

Mrs. Montgomery closed her statement with the following sentence, "This is our plan and this is our purpose--that you will go away from this session with a greater pride in your job and with much more know-how in this high purpose of working for and with programs which serve the people."

THE BASIC PHILOSOPHY AND FUNCTIONS OF GOVERNMENT

By James G. Patton, President, National Farmers Union

Summary: George H. Watrous, Farmers Home Administration,
Denver, Colorado

SUMMARY

Mr. Patton began his talk by pointing out that he considered it a privilege to discuss the subject of basic philosophy and functions of government with members of the workshop because we, as government employees, as much as any other citizens, have a vital interest and must do all in our power to make democratic government work, if western leadership, essential to the efforts of freedom living Western Democracies in their resistance to the influences of totalitarianism, is to be effective as an instrument of stability and peace in the world. A realignment of forces has evolved out of a power vacuum created by the destruction of German and other European economies as a result of two world wars. The economic exhaustion of European governments has resulted in loss of colonies and the resultant loss of influence over millions of people who for years had been dominated by social and economic controls imposed upon them by their colonial masters.

He further pointed out that release from the controls of Colonialism had given great masses of people, especially in the middle east, an opportunity to rise to equality and had also set the stage for a realignment of forces and a new struggle of two principles of government, Democracy and Communism.

He traced the history of empire by land acquisition through the periods of Feudalism and Authoritarianism up to the modern versions of both, represented by Fascism and Communism, and pointed out that individual ownership of resources and land was foreign to European and Asiatic thinking as something beyond realization and attainment and the Democratic system of freedom in the use of land and resources was a dream to which great masses of the people of the world were attracted but years of domination under colonial systems prevented a clear understanding of the democratic principles which made it possible.

He explained that the failure of Europeans to understand our system of government was matched by an equal inability on our part to understand theirs. He pointed out that our withdrawal from the League of Nations was a manifestation of our distrust and reluctance to become involved in economic and social systems we did not understand.

He concluded his preliminary remarks by expressing a belief that our leadership in the United Nations and our resistance to aggression in Korea indicated that we as Americans were now more fully aware of the threat of communism to our system of government and more willing as a leading world power to assume our responsibilities of world leadership.

He reemphasized his original point that we as public servants must do our full part in making democratic government work. He continued by pointing out that the United States to maintain its position and responsibility in world leadership and make Democratic principles the beacon of equality, liberty and justice to the receptive masses of the world must demonstrate its ability to provide the needs of our own people through dynamic democratic action and thereby establish assurance that our patterns of action through democratic processes will meet the needs of other nations and peoples of the world. He stated that "people all over the world are looking for a system of government that will eliminate the mud huts around the big house on the hill".

Mr. Patton pointed out that to accomplish that purpose we must embark on a program of purposeful, progressive planning looking toward abundance, full production and prosperity. He stated that this objective could not be accomplished in a year or a decade but could well be and probably would have to be a three generation program. He noted the problems of consistent long time national or international planning inherent in our system of government subjected as it is to the uncertainties of changing political climates and policies. He pointed out that our temporary plans of aid to Western Europe were only disappointing to the extent that they were stop gap emergency measures and accomplished their purpose well as such and should now serve as a basis for well thought out long time plans of constructive action.

Mr. Patton suggested that three generation planning integrated and adapted to the plans of the various working committees of the United Nations, if properly explained and understood, could become acceptable to the American people as a means of promoting unity of purpose, relative prosperity and ultimate peace to the freedom loving nations of the world.

Mr. Patton pointed out that the practical concepts of Democracy are well expressed in the various agricultural programs as the response of democratic government to the needs of the people and outlined ten points which he said he believed were the basic responsibilities of government.

1. Maintain climate of freedom conducive to full privileges of all citizens under the Bill of Rights and the Declaration of Independence. Permit free expression and exchange of ideas and thought. Permit full and unrestricted academic freedom.

He emphasized that loyalty orders which declared an individual disloyal if there is reasonable doubt, were a direct contradiction to established principles of law and constitutional guarantees. He suggested strengthening of the McCarran law to trace and punish real subversives as a means of eliminating politically motivated witch hunts.

2. Maintain Basic Economic Climate. Maintain economic climate which encourages human motivation toward better homes, better education and encourages the free enterprise desire for capital gathering. Two Hundred Billion Dollar national incomes and full employment are not socialism, and if they are, then that kind of socialism is good democracy.

3. Basic Processes of Planning. Create authority by a process of allowing people to participate in planning through all stages of development of plans. Integrated valley authorities - grass roots to regional to

to national to international plans participated in at all levels by all interests.

4. Education. Formal and Informal. Complete educational opportunities. Stress the informal side of education. Informal education is citizen participation in affairs of government, Soil Conservation and other committees, are examples. Families need to understand the world in which they live. Democracy is political action. Political power forces discussion. Information services of government are a means of presenting facts and information to people and should not be dried up by the Hatch Act.

5. Citizen Participation in Government. Farmer elected committee system should represent everyone in agriculture. The farm policy review has demonstrated that no organization is capable of representing all interests or all people in agriculture.

6. Move Government Closer to People. Decentralize functions of government and let decisions be made in the counties. Depopulate Washington. Planning and legislative functions should be returned to grass roots. Bureaucratic levels of authority block off complaints.

7. Resource Developments. It is a responsibility of government to restore, preserve and develop national resources, promote conservation and use of water. Soil Conservation payments should be considered partial payments to the farmer for past destruction. Bridle the power interests and promote integrated development of water and power resources. Eliminate bureaucratic power struggles which are another manifestation of lack of overall planning.

8. Government Service. Bureaucrats are developing managerial concepts based on the dangerous conception that people can't think. Managerial elite. Original ideas come from rank and file. Some cooperatives are becoming so big the managerial class doesn't know what's going on.

9. Pride of Service. Government employees should take pride in rendering service if that service is properly geared to a concept that they are doing their part in helping to build a better world. In a service dedicated to the principles of abundance, prosperity and peace, there is no room for scarcity thinking.

Mr. Patton concluded by reminding the group that government and bureaucracy could become so big that policy could only be made by managerial errors. He cited Italian problems of administration under ECA where engineers and scientists had become professional elite more interested in maintaining their elite status than rendering service. He pointed out that government employees must avoid the same pitfalls by going too far in seeking the wrong kind of security. Government and bureaucracy, like an aeroplane, he said, stalls when it loses speed when government servants become more interested in a complete guarantee of security for themselves than in rendering service to people. Government employees reach stagnation in their effectiveness in rendering service when they are afraid to tell the boss to go to hell because they may lose their investment in security in their job.

American democracy must be vital and dynamic and government employees as well as all citizens must remain aggressive and vital in the pursuit of our national and international objectives if we are to attain our goals of abundance, prosperity and peace. We must make democratic government work.

DISCUSSION

Responding to questions Mr. Patton expressed some concern in the matter of interesting people to more fully participate in discussions and meetings of government at the grass roots level. He stated that lack of factual information as a basis of discussion was probably one reason of lack of interest. More study must be made of the problem of getting all segments of population interest into meetings for discussions and action.

He reemphasized the importance of long time or three generation planning in national and international policy and plans for action and reiterated that current disappointments in our foreign aid efforts were politically motivated expediencies more than general dissatisfactions with the accomplishments. He pointed out that current investigations and witch hunts were also political expediencies and government employees should consider them as such and refuse to be daunted or restrained by their implications in the proper performance of their duties and responsibilities to the public.

REFERENCES

"The Black Peril of Fear" - William O. Douglas
New York Times - January 13, 1952

THE BROAD PERSPECTIVE OF MANAGEMENT

By Dr. Albert H. Rosenthal, Director, School of Public Administration, University of Denver, Denver, Colorado

Summary: G. E. McCrimmon, Assistant State Conservationist, Soil Conservation Service, Denver, Colorado

SUMMARY

Perspective - the examination of facts or matter with just regard to their proportional importance
Management - the skillful or prudent use of means to accomplish a purpose

For this discussion, Dr. Rosenthal used the terms "administration" and "management" synonymously.

Woodrow Wilson (Study of Public Administration - Political Science Quarterly - 1887) wrote that the aim of public administration is "To straighten the paths of government; to make its business less unbusinesslike; to strengthen and purify its organization; and to crown its duties with dutifulness."

Luther Gulick coined a word to define "management" or "administration" -

P - Planning
O - Organizing
S - Staffing - the personnel function
D - Directing - process of decisions
CO - Coordinating
R - Reporting
B - Budgeting

Dr. Rosenthal stated that management is concerned with the accomplishment of certain purposes, and uses techniques of planning, organization, personnel management, financial management and reporting (static functions) and coordination and motivation of personnel (dynamic functions).

We must critically examine, realistically and objectively, what we are doing alongside our basic purposes and objectives. We can start this analysis with two basic premises:

A. That management in government should be as efficient as possible;

B. That management in a democracy has certain special responsibilities to the citizen and to its employees, who are citizens as well as employees.

Dr. Rosenthal presented a thesis in three parts:

A. The most effective management in a democracy is one founded on democratic concepts of participation rather than direction; and

persuasion or leadership rather than coercion.

B. These concepts of participation and leadership must be woven throughout the fabric of the organization and reflected in every procedure, not simply accepted as a general motto.

C. That the realities of democratic administration must not be confused with the adoption of gimmicks or superficial plans.

In discussing the statement that democratic administration strengthens effective management David Lilienthal in "This I Do Believe" was quoted: "Democratic action is that which furthers the importance of the individual by methods that increase individual self-development, responsibility, and integrity"--"The essential ingredient of democracy is not doctrine, but intelligence; not authority, but reason; not cynicism, but faith in man and in God."

Joseph Rosenfarb, in "Freedom and Democracy in the Administrative State" emphasizes free competition for leadership, the basis of persuasion in settling questions and the importance of consent. Dr. Rosenthal said, "Our own logic affirms the value of democratic administration to more effective operation."

In discussing the second part of the thesis--that democratic concepts of participation and leadership must be facilitated through organization and procedure--Dr. Rosenthal pointed to the following methods:

A. Delegation and decentralization of responsibility and authority as far outward and downward as possible

B. Clear lines of communication both ways

C. Staff conferences of people concerned in formulation of policies

D. Spirit of cooperation and respect throughout the organization

Dr. Rosenthal believes that the third part of the thesis--that realities of democratic administration must not be confused with the adoption of gimmicks --may be the most important. He stated that "In administration we are getting conscious of fads that come and go." He mentioned the failure of staff conferences, suggestion systems, personnel utilization plans and management surveys when no basic sincere intent in democratic management was in evidence. The emphasis must be on clear cut understanding of the importance of the individual and on sincere effort to help him make his fullest contribution. This emphasis on human dignity is in brief "This Is Democracy".

In summary, Dr. Rosenthal said "In evaluating a government activity, we refer back to fundamentals--We must not lose sight of an over-all objective which is the contribution made in our democratic way of life". "The achievement of democratic management is a difficult and complex task--it is a constant day to day job." He quoted Ben Franklin as saying, "All the Constitution guarantees is the pursuit of happiness--you've got to catch up with it yourself."

DISCUSSION

Questions and answers centered on the following thoughts:

A. Through democracy, you get the best administration.

B. All authority in administration comes from below by consent--this is a fundamental principle of democracy--this is true even in the case of a United States Navy Captain who has absolute power on his ship.

C. The mosaic of hundreds of little decisions can mean democratic administration or they may add up to dictatorial methods.

D. The merit system is to get and keep the best qualified people through a democratic process.

REFERENCES

"Creative Experience in Dynamic Administration" - Mary Follette
"Collection of Essays" - Mary Follette
"Functions of the Executive" - Chester Barnard
Syllabus by Rosenfarb - "Freedom and the Administrative State"
"This I Do Believe"- David Lilienthal
"Papers on the Science of Administration" - Gulick and Urwick
"Art of Leadership" - Ordway Tead

POLICY

By Leo C. Riethmayer, Associate Professor, Political Science,
University of Colorado, Boulder, Colorado

Summary: C. T. Brown, Forester, U. S. Forest Service, Denver, Colorado

SUMMARY

Professor Riethmayer introduced his subject of Policy and then developed the following regarding this topic.

1. Policy is the "What" of government

   (a) What is government going to do?
   (b) What agency is going to do what?

2. Policy includes:

   (a) The laws (basic and organic), administrative regulations, and fundamentals.
   (b) The support of the administrative agency evolves from policy.

3. Forces that determine policy:

   (a) People through their representatives and senators
   (b) Partisan policies
   (c) Pressure groups (sometimes this force is more influential than average citizens)
   (d) Administrators of agencies (this is a strong force in policy formation)

4. Administrator's responsibility in policy formation

   (a) He must have a staff capable of submitting policy requests.

      Legislative bodies need background material from the administrators before they can formulate laws and regulations.

   (b) Must understand the political climate.
   (c) Must have sound facts (this of course ties in with (a) above, since the facts will come from the administrator's staff)
   (d) Interpretation of broad regulations into agency policies

      He must follow the intent of the legislative body.

   (e) Should consider the public relations aspect in developing procedures that are acceptable to public.

      Procedure is actually the application of policy. There is considerable room for confusion in the two terms, policy and procedure.

DISCUSSION

Professor Riethmayer gave a brief and concise talk on policy which resulted in considerable discussion from the floor. The most discussed problem stemmed around the public relations problem. It was brought out that better public policy will naturally develop into better public relations since the people are the judge of all policy matters. The agency employees must be tactful and diplomatic working with the people. It often occurs in some agency that the implementation of policy through procedure sometimes gives the public a false idea of policy. The Forest Service policy of range reduction was mentioned and discussed. It was brought out in the discussion that advisory councils and local boards will help to correct any bad public relations that the Forest Service has developed in carrying out this policy.

The question arose as to whether or not "information" and "promotion" can be separated. Professor Riethmayer answered that it is not necessary to keep them separated since the public must be kept informed of all matters at all times.

Since administrators are closer to the people than are the legislators they make decisions on policy procedure which sometimes cause jealousy between the two. That is one condition that the administrators should recognize and guide their procedure accordingly.

As a means of expressing policy, it was agreed that it should be in writing. Policy statements should also be clear and concise and in simple language. If local conditions demand special procedures to carry out policy statements they should be developed as needed. It is the responsibility of each supervisor to see that all policies are understood by all employees of his staff.

REFERENCE

"The Changing Patterns of Public Policy Formation" by Ernest Griffith from the June 1944 American Political Science Review

PROGRAM PLANNING AND EXECUTION

By Willis O. Underwood, Assistant Manager, Veterans Administration Hospital, Denver, Colorado

Summary: William B. O'Rourke, Personnel Officer, Farmers Home Administration, Denver, Colorado

SUMMARY

"Planning is reduced fundamentally to developing agreement among leaders as to the goals to be sought, the provision of means of action and persuasion of those concerned to use facilities available to achieve these goals", Mr. Underwood said in pointing to the basic elements of this phase of the administrator's job.

Opening his session with a broad discussion of planning in government, he cited its importance by enumerating several familiar, actual examples at all levels of government.

The two phases of program planning were listed as the establishment of the policy by law or by the executive followed by the actual steps taken to place policy into effect, and a comparison with individual project planning at the lower levels of operation was made.

"There can be no management without planning", he said, "and this is true at all levels from policy stages down to the day's work. The difficulty and range of planning depends upon the magnitude of the mission, the level of operation and its setting, including its location, the nature of the demand and the kind of public interest."

Pointing to the recent shifts in program emphasis in the Department of Agriculture resulting from changing economic conditions and new national demands, he outlined some practical Departmental problems requiring the careful development and execution of plans. Taking another example in the work of the Denver Post Office, he listed some of the problems developed during the past year as a result of sharp cuts in funds, the need to reduce deliveries and the advent of the Air Force Finance Center, which when added to normal gains has boosted the office's volume to one million pieces of mail every 24 hours.

In his detailed description of program planning, he listed the following points:

1. Policy is established by law and/or the executive leaving unresolved the steps to be taken to bring the policy into being--planning begins where policy leaves off.

2. Planning is the recurrent study and formulation of operations on the basis of established policy.

3. Program planning means to effect policy through the most economical use of resources.

4. Planning is reduced fundamentally to developing agreement among leaders as to the goals to be sought, the provision of means of action and persuasion of those concerned to use the facilities available to achieve these goals.

He listed the following as the elements needed to do a good planning job:

1. Knowledge of the organization's mission which can be obtained from such varied sources as congressional hearings, a study of the original problems which the program was created to meet, the history of its work to date, the extent or volume of the job, and the primary objectives.

2. Knowledge of the organization -- "Up, down and sideways."

   A. Up -- who establishes policy, to whom do you report; what about appeals, inspections and reports; how is responsibility and authority delegated.

   B. Down -- what is your organization, are the duties and responsibilities defined; are there adequate and proper provisions for coordination, training and communications.

   C. Sideways -- the primary importance of relationships with such agencies as the Civil Service Commission, FBI, GAO, General Services Administration and the Bureau of the Budget.

3. Knowledge of the capacity of the staff -- numbers, potential, training and training problems, experience and flexibility.

4. Knowledge of available resources, including funds, personnel ceilings, equipment, location of headquarters, space, transportation and other facilities.

5. Knowledge of the volume of work -- the record of what the demands have been in the past, what the existing load is and how it can be expected to change in the future.

6. Knowledge of outside relationships and influences, including the interests of the general public, the effect of an emergency, and the nature of social, economic and other conditions.

Going into techniques of planning, he cited the problems involved in gathering data, synthesizing the information and formulating the plan of action.

Approaches listed here were:

1. Staff interpretation of agency policy based on an overall view and the general experience of the staff officers.

2. Making research studies -- organizations and methods studies, administrative surveys, physical layout studies, analysis of procedures, work simplification studies, and personnel utilization studies.

3. Canvass of consumer and public reaction.

4. Employee participation -- use of ABC conference methods.

5. Supervisory audits.

6. Reports

DISCUSSION

Principal element in the discussion period related to the problem of getting the plans clearly presented and completely understood by members of the organization team.

In this case, participants cited many of the problems developed as a result of faulty communication.

In discussing these with the group, Mr. Underwood stressed the importance of careful organization, systematic delegation of authority, and proper supervision.

There was a detailed discussion of the use of personal communications such as letters, wires, questionnaires, memoranda; such mass media as manuals, circulars, bulletins and studies; and oral communication by telephone and intercom systems. As an example of the improvement that could be made in methods he described the new pneumatic tube system used at the new Veterans Administration Hospital.

Mr. Underwood presented two charts outlining the principal points of his topic.

SPECIAL TECHNIQUES OF PLANNING

By Paul C. Howard, Executive Assistant to Director, Field Operations, Federal Security Agency, Washington, D. C.

Summary: Wallace L. Bruce, Dist. Conservationist, Soil Conservation Service, Sterling, Colorado

SUMMARY

Mr. Howard prefaced his lecture by stating that the Federal Security Agency was a Centralized Service unlike those in Department of Agriculture; and operated from central authority. He stated he would describe their agency and the planning techniques used.

A. Some Aspects of Planning.

1. Planning is characteristic of people in general, resulting from desires and living. It is a part of our social fabric, i.e., Cited his own children - who when put to bed plan out their next day's activities. We must plan if we are to have orderly lives. In this session we are considering conscientiously conceived formalized planning in Government.

2. Characteristics of Planning. The Planning process must be a dynamic, driving force - can never be static and successful. To be successful, it must be closely related to operations. Planning cannot be successful as an Ivory-Tower proposition.

3. Major steps in planning.

   a. Determining what are the problems or objectives in planning - a selective process.

   b. Determining how to solve problems which involves:

      1. Setting time schedules.
      2. Laying out the work.
      3. Assignment of responsibilities.
      4. Staff participation.

   c. Measuring results or movement toward stated goals.

4. By-Products of Planning.

   a. Means of information to top officials how the work is progressing.

      1. Planning may start as reporting or through reporting devices.

2. Adequate planning helps in the development of Budgets.

5. Planning is a part of the total Administrative process - Planning, Budgeting, Research, and Program operation are inter-related and inter-acting as elements in the total administrative process. i.e.

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                    Budgeting
Pl          :                 : RE
  an        :                 :   se
    ni      :                 :     ar
      ng    :_________________:       ch
                Operations
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B. Special Techniques in Planning.

General Statement: Special techniques vary in scope, purpose and effectiveness, depending upon (1) levels used, (2) availability of money.

a. The budget is a special technique useful in:

1. Base for planning operations.
2. Reporting device.
3. A mechanism for channeling, Planning, and forcing planning.

b. Work Planning and Reporting device as done by Social Security Agency.

1. Each Bureau is required to submit a Work Plan to Commissioner by early June.

a. Covers continuing work.
b. Special projects.
c. Includes Man Days.

2. Meetings are held to review projects and correlated with Budgets.

a. Report on progress required at end of fiscal year.

c. Research Planning as carried on by Public Health Service. This Bureau works in Grant-in-Aid field; carries on a great deal of Research.

1. Committee on Research - Coordinates all information.

a. Studies objectives.
b. Plan of work.
c. Results.
d. Costs.

C. Work standards and measurement devices. This type of technique can be used as a planning mechanism in areas which have measurable, definable end products.

1. Board of Old-Age and Survivors Insurance. Use pars in measurements of such things as account numbers issued, claims processed, etc.

   a. Done by sampling work in March through April - to get a basis for comparison. Time and Cost study - selection made of 40 clearly defined functions. These functions must have a clearly measurable work load and functions that represent at least 50% of work load. The results are correlated with comparable situations. Translated into cost terms. In this particular study, the objectives are to facilitate:

      1. Comparisons of operations in Regions.
      2. Assist in making allotments.
      3. Facilitate development of Budget estimates.

DISCUSSION

In applying work standards - full employee participation is essential, in keeping morale at a high level. Must sell employees on idea. Material should be used in a positive way for seeking improvement in handling work load analysis where work is seasonal. Time standards must be self-determining, considering all conditions. Sample should be representative enough to get an adequate picture of the situation. Too small a sample might be misleading.

It is important to let people know what is expected of them - then studying their performance.

Example - Current performance Requirement System, set by Civil Service. The Standard of Performance is a wonderful tool if used and administered properly. Can be very successful if red tape kept to minimum plus a little good supervision. Employee relations is a big problem in setting Goals, and every effort should be made to make employee a part of Goal setting. Incentives should be considered. Just as much importance should be given to interpretation of time studies, as making the time studies, if good Administration is to be realized.

PROGRAM ANALYSIS

By Harvey O. Robe, Supervisor - Gunnison National Forest,
Gunnison, Colorado

Summary: Clarke A. Anderson, Forest Service, Denver, Colorado

SUMMARY

Supervisor Robe emphasized that Program Analysis is simply an evaluation of organizational performance against established objectives and standards. Experience with Forest Service program analysis used as illustrations and well reviewed by the group are omitted because of space limitations.

Basic principles in considering the effectiveness of a Government agency were cited as the caliber of public service rendered, the human benefits produced and the effective expenditure of time and money in the public interest. These contrast with private enterprise whose sole motive is "Business for Profit".

Robe explained that in evaluating performance two managerial functions must be analyzed -- planning or what is to be done and control or getting the job done.

Planning would normally include a guiding principle as "The Greatest Good to the Greatest Number In the Long Run;" clearly stated program objectives to insure that all agency personnel know what their outfit is shooting at and where it is headed; Well defined policies to aid in attaining agency objectives; reasonable quantity and quality targets, often termed work standards and measurements; job and work load analysis, sometimes called organizational needs; work planning and scheduling to nail down what and how much is to be done, as well as in what manner and how well; direction or the day-to-day supervision of individual program activities at all organizational levels; and training and personnel development -- the item of human relationships.

Control - action taken to guide an organization toward attainment of its objectives with the follow-up necessary to insure a job well done, on time and in accordance with established policies, standards, and plans -- is a most important step in program analysis. Robe referred to the quotation that "Human Beings are Human Beings, -- and as such, human performance without necessary control will never reach an objective -- it will always lag behind."

A. Controls, both financial and administrative, may either be established by law or regulation over which administrative agencies have no control and which may not necessarily benefit the day-to-day operation of the program or by the agency itself, in which case care must be exercised to be certain that the organization is neither under-controlled nor over-controlled.

B. "Controls cannot be too purposeful," Robe stated, "unless organizational structure is sound, functions and responsibilities are clearly understood at all levels of an organization, progress is periodically and critically evaluated and necessary corrective measures are taken to insure that work is continually geared to objectives."

C. Control tools mentioned included (1) programs and plans envisioned to attain objectives with budgeting balanced against the over-all job; (2) reporting procedures established for providing information on progress, quantity, and quality of work and financial planning, but elimination records no longer necessary; (3) training to quickly orient the new employee and improve the old; (4) manuals furnishing uniform information for all and standardizing policies, methods, etc.; and (5) inspections of all work with necessary follow-up. Robe stated that "While, in the Forest Service, a cold blooded appraisal is considered an absolute must as much care should be taken against over-inspection as against under-inspection."

In conclusion the importance of a thorough-going job of program analysis was stressed as was the fact that results count and that a critical periodic evaluation of employes batting averages puts them in a better position to improve their score and do a better job.

COMMENT

Program Leader Cyril Luker called particular attention to the analysis and control features of Mr. Robe's excellent presentation and asked that group discussion center around these items.

DISCUSSION

Question was raised as to how the Forest Service obtained the reported widespread acceptance of policy by those at all levels of their organization. Robe again explained the excellent and closely knit chain of communication from top to bottom and bottom to top, training media, frequent staff meetings, inspection procedures and that the chiefs' annual plan of work with major activities for each year was furnished to and incorporated in each region's plan, thence into the various Forest and Ranger District plans with delegation of authority and job assignments right on down the line.

Some concern was expressed over the critical type of inspections employed by the Forest Service, whether they were well accepted by those inspected, what follow-up procedures were used and how the public knew whether a good job was being done. It was pointed out that trained personnel were used on inspections - the work was participated in by, fully discussed and often written up with and generally welcomed (even requested) by those inspected; that follow-up was obtained by scheduled compliance reports and comparison with previous inspections; and that community leaders and other key individuals were consulted by inspection in the course of their work so that both the Forest Service and the public knew what was being done as well as what ought to be done.

FINANCE AND BUDGETS

By Bert W. Johnson, City Manager, Boulder, Colorado

Summary: L. B. Owen, FHA, Denver, Colorado

SUMMARY

Mr. Johnson prefaced his presentation on "Finance and Budgets" with a general outline of the functions and operations involved in his capacity as City Manager for the city of Boulder, Colorado. Although the Council-Manager form of government is relatively new, it is perhaps the most direct and democratic form in use today. It is now employed in over 1000 cities in the United States. The Council-Manager method, as under the Federal system, requires the cooperation of a majority of the people as well as team-work and cooperation among those responsible for administering the system. In his discussion, Mr. Johnson very capably described the important relationship that budgeting and finance have to good government. Some of his comments and key points were as follows:

"Government exists to give services to the people and to regulate certain of their activities for the common good. Therefore, no decisions are more important in government than those that determine what services shall be provided and what services are to be regulated. Unfortunately, the attention given to these decisions is not always proportionate to their importance. Too often we take for granted our over-all programs without questioning. We dislike the weighing of intangibles as the relative needs of those we serve. Too often our program has developed through a succession of historical accidents.

"Our budget procedure often reflects our failure to make long-term decisions. We base our estimates on last year's expenditures--assuming they have been already justified. Some of us have bulging budgets because of some peculiar political quirk--we insist on its retention though other needs are often more urgent.

"The failure in all levels of government is the failure to undertake comprehensive programming and evaluation of their service.

"Each of us needs a comprehensive plan indicating what things are needed, the relative importance of the various items, and the location, character, and scale of what is to be done to satisfy these needs. This long-term service program will schedule these items over a period of years, so that they can be provided as needed, within the limits of the available financial resources.

"Although there is no best way to prepare and administer a budget program, the following are steps that might be taken:

1. Enumerate your objectives.

2. Estimate how needs for each service are expected to increase or decrease over a period of time due to specific factors.

3. Identify the key factors that determine the cost of each service provided.

4. Set tentative standards of quality or adequacy for each service.

5. Having taken these four steps, determine the approximate annual cost of providing each particular service. Subdivide this into (a) annual operating and maintenance costs, and (b) cost of needed capital improvements and major equipment purchases.

6. Draw up a capital budget, scheduling by years the capital items needed to carry out your service program.

7. Then you are in a sound position to draw up your annual budget proposal. It is a bridge which carries the plan into action by getting, appropriating and controlling funds for the year's operations.

"Work programming has been highly developed in the field of public works and is also used in other areas including welfare and recreation. In some fields, quantitative measurements and unit costs have not been developed and this represents one of the most fertile and useful fields for pioneering by progressive executives.

"Do not look on budget procedure as a barrier. It is a tool for effective exercise of executive functions. It must be looked on as a year-round method of channeling and controlling government operation--in short, if budgeting is not looked upon as a method of obtaining the fullest return for each dollar of public funds spent, if it does not become a day-by-day way of administrative thought, the best of forms and regulations will not obtain the desired result.

"Good budget administration involves (a) allotments (b) encumbrances (c) reporting and (d) administrative audit."

DISCUSSION

Mr. Johnson's description of "administrative audit or investigation" was aptly termed "executive inquiry." His closing comment was the following quotation by Thomas Payne:

"Public money ought to be touched with the most scrupulous conscientiousness of honor. It is not the product of riches only, but the hard earnings of labor and poverty."

Much of the discussion brought out the need for preparing budgets from a program standpoint rather than from a money standpoint; on a long-term rather than a short-term basis, and providing for a complete budgeting service, including not only budget estimates, but adequate procedures for making allotments periodically, a sound reporting system, continuous administrative audit, and provision for investigation.

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PRINCIPLES OF ORGANIZATION

By Miss Verna C. Mohagen, Chief, Personnel Management Division Soil Conservation Service, Washington, D. C.

Summary: G. A. Wright, Chief Accountant, Area Finance Office, Farmers Home Administration, Denver, Colorado

SUMMARY

Miss Mohagen covered the various kinds of organization and associated them with organization and the Department of Agriculture. She briefly touched on types of organizations and problems throughout history. There are three essentials that must preface the setting up of an organization:

1. The tasks to be performed must be determined.
2. The allocation of human and material resources must be known.
3. The internal and external relationships must be established.

The following types of organization are used:

1. Functional type.
2. Process or profession type.
3. Clientele or commodity.
4. Geographic area.

In discussing principles of organization Miss Mohagen mentioned the following types:

1. The Scalar Process. This is the hierarchy type that is graded according to ability or responsibility.

2. Functional. The best example of this type is the Government, where we have the legislative, jurisdictional, and the executive branches at the top.

3. Line Organization. This is the simplest and most direct type, but is rarely used alone.

4. Staff Organization (Administrator). Experience shows that a combination of the line and staff type is a very practical organization and is used in the agencies of the Department of Agriculture. The Administrator has his line and staff organizations, which are normally well separated at the higher levels of authority.

5. Board or committee system. It was brought out that this type of organization is hard to operate and is not very effective. This should be very definitely differentiated from the advisory board or committee used very successfully in the Department. Only if this system is attempted to perform and control operations is it inadvisable.

Miss Mohagen gave 10 principles of good organization which represented her experience in the Department of Agriculture and her studies on this subject:

1. Comprehensive coverage. Every function to be performed should be definitely assigned.

2. Anti-overlapping. Unnecessary duplication and overlapping should be avoided; no function should be assigned to more than one independent unit. Duplication and overlapping are probably the cause of most of the waste in management.

3. Clear cut and well understood assignments. Say what you mean and mean what you say. Clear thinking, clear expression, and clear communication are essential.

4. Every employee must know to whom he reports and who reports to him.

5. "No man can serve two masters." It has been found that in almost all circumstances an individual should report to only one person.

6. Line functions clearly delineated from staff functions; channels of command should not be violated. This principle must be used with intelligent reason, however, and accomplished by proper delegation of authority. Individuals in one channel of command can often directly cross to the other channel of command rather than going up to the top in one and down to the necessary position.

7. Responsibility should as nearly as possible be matched by authority. It is usual and desirable that under many circumstances responsibility does exceed authority. Numerous positions require that an individual be responsible for maintaining good relationships although there is no authority that can be given him which will match this responsibility.

8. Delegate authority as closely as possible to the point at which action occurs. Only in a few circumstances, such as research, does the Department of Agriculture have a high degree of centralization.

9. Limitations of span of control. Often span of control must necessarily be limited by the personality of the individual. Some authorities have recommended the span as low as three individuals; others have found that when the span is too short, the supervisor is liable to oversupervise, and there is a tendency to pay too much attention to details. Some of the large commercial organizations have found it necessary to increase the span in order to properly train their executives away from detail.

10. An over-elaborate organization may hinder work accomplishment. The red tape becomes time consuming. It was mentioned that in the Department classification and grade-structures often become obstacles.

Miss Mohagen mentioned the following additional principles or factors for consideration:

1. "Organization must provide, through its principles and their application, for the continuous winning of consent of a great number of people in the formulation of and movement toward a purpose." This is probably one of our most important goals for organization planning.

2. Uniform methods and procedures should be installed where applicable.

3. The principle of "coordination" encompasses all principles of organization.

4. Principles of Homogendity. The efficiency of an organization is directly related to the homogeneity of the work as performed.

5. The organization should be documented by organization charts and manuals.

6. The informal organization may be as important as the formal organization. This covers intelligent short circuiting that is necessary to efficient operations.

7. The traditions and "folklore" of organization are not only interesting but important.

DISCUSSION

A considerable part of the discussion centered on the differentiation between line and staff organization. It is basic that the staff authority should not usurp the line authority. It should constantly be kept in mind, however, the point at which the two are separated. As an example, usually a Regional Director has a clear cut line of authority and is given full responsibility for certain functions. The staff responsibility he has should not be mixed with his line authority. The principles of good delegation was thoroughly discussed and the major point to be remembered is that it must be fluid and reviewable.

Discussion brought forth the comment that the USDA is handicapped in placing up and coming people into top flight executive positions. It was agreed, however, that even though this problem does exist, we are not doing the best job with the tools we have at hand. Essentially, the initial selection and continuous training are fundamental. We must always keep in mind the problem of not discouraging career people. The fact that a person is highly qualified technically does not mean that he can or cannot be promoted to more responsible administrative jobs. An important factor in planning for those positions is close attention to the qualification standards set up for the Administrator.

COMMENTS

"In group thinking, the new ideas evolved are more than the sum of the individual ideas."

"Divisions and departments sometimes grow up around the problem - solving abilities of a particular individual."

"There is no royal road which avoids complicated traffic points in organization."

"This organization may work - it all depends upon the individuals who are assigned to run it."

"While systems are important, our main reliance must always be put on men rather than systems."

"An organization is the lengthened shadow of a man."

"Though we find elements of weakness in the very process of organization, they are not weaknesses that necessarily grow greater with the size of the structure. The limits are not limits that come only with size. With the growth of the structure comes still further division into groups and greater need of coordinating ability in administrative offices, but there remain always the same underlying principles of efficient endeavor; the choosing of the things worth doing, the emphasizing of factors that have the greatest bearing on the result, and the elimination of that which has no significance. It is true that in the end we have to say that this choosing and this judgment is the important matter, but we must realize that it is not to be supposed that organization will take the place of business ability. ORGANIZATION IS BUT A MEANS TO AN END. IT PROVIDES A METHOD. IT CAN NEVER TAKE THE PLACE OF BUSINESS JUDGMENT OR INTUITIVE SENSE OF WHAT IS WISE TO DO, OR VIGOROUS INITIATIVE THAT SETS THINGS IN MOTION, BUT IT CAN HELP TO SECURE THESE BY RELIEVING FROM DETAIL THOSE WHO MUST EXERCISE THE JUDGMENT, AND BY BRINGING TO THEM THE PREMISES THEY NEED. AND IT CAN HELP THE EXECUTION BY PROVIDING ORDERLY PROCEDURE FOR CARRYING OUT THE ACTION THAT IS DETERMINED UPON."

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ADMINISTRATIVE LEADERSHIP

By Frank H. Spencer, Asst. Research Administrator, U.S.D.A.
Washington, D. C.

Summary: David H. Millar, Special Representative, Management
Division, Rural Electrification Admin.,
Denver, Colorado

SUMMARY

Mr. Spencer, in his Introduction, gave as his opinion, that the "Work-shop" is the way to handle Training on a local level for three specific reasons:

A. Ability and Freedom to set our own Program;

B. Obtain local speakers and consultants;

C. More people can be exposed to the training, without prohibitive costs to the Department.

In defining Leadership, Mr. Spencer remarked that "the principles of Leadership apply to ALL fields and it is simply incidental that our field happens to be Administration", and by Administration, he said, "I do not mean the narrow concept of business operations, but the much broader one of the conduct of the work program of the Department." He also said that as good a definition of "Leadership" as he had heard was given at the Portland, Oregon TAM Workshop as follows: "The ability to get people to do what you want them to do, when you want them to do it, and because they want to do it."

Another way of defining: "A leader must first know where he wants to go; second, know how to get there; and third, be able to inspire others to go with him." Mr. Spencer qualified this last by saying that "the place to which the leader wants to go must be a proper place or destination for himself and his followers", and he mentioned Hitler as an illustration of a man with great qualities of leadership, but whose goal was not sound.

Under "Leadership Functions" the speaker listed 13 qualities or characteristics he felt to be essential:

A. Knowledge.

1. Subject matter and ability to assess and orientate.
2. Knowledge of organization.
3. Knowledge of human nature: an understanding heart - "Machines cannot work without men." Must like and respect people.

B. Imagination.

1. Not day dreams, but ability to see final results.

C. Responsibility.

1. Defined as "an emotional condition that causes an individual to want to do what he feels he is morally bound to do and restrains him from doing what he feels he is morally bound not to do." "The man who cannot carry the burden of responsibility, day in and day out, in easy times and hard, without buckpassing and without wearing his reserves to the breaking point, is not qualified for Leadership."

D. Ability to Select Key Assistants.

1. "There is no magic about selecting competent personnel."

2. "The ability and character of individuals can be determined only by a careful process of checking and interviewing."

E. Ability to Delegate Responsibility and Authority.

1. Not a simple matter: assistant must be trained to accept.

2. Organization lines must be set up and procedures established.

3. Two way lines of communication must be established.

4. Willingness to pass authority down the line is a basic necessity, but Leader must be careful to see that delegation is properly utilized.

F. Decisiveness.

1. "An important factor is the ability, once a decision has been made on the basis of the best information and consideration possible, to regard it as a settled issue."

2. Change only when basic conditions make necessary.

3. Don't worry whether or not some other course might have been better.

4. Clear cut announcement of a decision is a morale booster to those affected. Don't put it off.

5. "There comes a time when action is so necessary that a decision must be made even though it may not be the best one which could possible be reached if time were unlimited."

6. "It is literally true that there are circumstances in which the wrong decision is better than none at all."

G. Dependability.

1. "Be in the place you are supposed to be, doing the job as it is supposed to be done."

2. Cited examples in "Stonewall Jackson and W. A. Jump of USDA.

H. Integrity.

1. Various kinds: "dollar honesty" and "intellectual honesty".

2. "A searching test of a man's intellectual honesty is his ability to back off and take a careful look at himself".

3. "One of the greatest barriers to complete integrity is the natural human reluctance to discover and admit one's own errors." This is a barrier that must be surmounted by a genuine leader.

4. Fairness: ethical consideration of competitors, associates and employees. Not influenced by family, friendship or fraternal ties in filling vacancies or making promotions.

I. Unselfishness.

1. Distinction between ambition and selfishness.

a. Ambition is a healthy sign, but leader must assure himself that it is legitimate and related to organizational progress and a contribution to society as distinct from personal gain.

2. Do not withhold credit to staff and associates, where due.

J. Loyalty.

1. "An obligation which works both ways: from the worker to the boss, and from the boss to the worker."

2. The leader should have more loyalty than his people.

3. "Many a good cause has been lost, but none has ever been abandoned when its leader had a true concept of loyalty."

K. Patience.

1. A much misunderstood virtue.

2. "Taking whatever situations develop and making the best possible use of them."

3. Involves endurance and self-restraint.

4. "Making best use of experiences and opportunities."

5. Example of Moses.

L. Courage.

1. "Involves not only the overcoming of fear and discouragement, but the ability to try new methods and to laundh into new fields." Be able to break with tradition.

2. Most people not without fear.

M. Faith. (Confidence)

1. In himself (but not conceit)

2. In others. Team work and mutual confidence in others.

3. In the future. Illustrated by reading a 100-year-old news story.

4. In God.

a. Speakers' belief in an intelligent God working out a plan for the improvement of the human race.

Mr. Spencer enumerated the rewards of Leadership as follows:

A. "Sense of achievement that comes with a worthwhile job well done."

B. Satisfaction found in the development of people.

C. "Growth of the Leader's personal character".

1. No substitute for personal character and it is not developed by a life of ease.

D. Material success usually follows and is important, but the rewards listed above are felt by the Speaker to be of much more importance.

E. "Day by day he takes on new responsibilities, meets and overcomes new difficulties, and has new experiences in dealing with situations and people. He inevitably grows and becomes increasingly the type of person he had it in him to become when he voluntarily took on the responsibilities and obligations of Leadership."

DISCUSSION

In response to a question, Mr. Spencer gave it as his opinion that even in the selection of key personnel in government offices, the leader was in a position to exercise selectivity in spite of "pressures" from above, and regulation of the Civil Service Commission,

In response to a query as to how to put these qualities of leadership to work for the individual, Mr. Spencer suggested reading biographies of leaders; not to be limited by "hour" routine: and by taking advantage of the "experience of living."

When asked to enumerate the MOST important of the thirteen qualities of leadership he had mentioned in his formal remarks, Mr. Spencer said he believed that knowledge, ability to accept responsibility, ability to delegate responsibility, decisiveness, dependability and faith would be the way in which he would list them.

The speaker gave as his belief that the quality of "horse-sense" was implicit in Leadership.

Other qualities mentioned by members of the Class and concurred in by Mr. Spencer were: Humility, which he believes to be a part of faith in one's self; recognition of essential dignity of other people, usually mentioned as "Human Dignity"; development of people; and education of the public generally.

DELEGATION OF AUTHORITY AND GETTING ACCEPTANCE OF RESPONSIBILITY

By Brig. Gen. John R. Gilchrist, Commanding General, A.F.F.C.

Summary: J. Dale Schott, Assistant State Conservationist, Soil Conservation Service.

SUMMARY

General Gilchrist presented a brief resume of management principles as a backdrop to his discussion of this subject. His statement on this follows:

The principles which must be used in building an organization must be sound, they must provide comprehensive coverage, be susceptible of being tested and be held to a minimum.

On the basis of these criteria, he said the following principles are considered acceptable. First: we should have unity of command. This means that ultimate control of all action towards determined objectives of the organization be vested in one individual at each organization level of control.

The next item is the span of control. This signifies there is a limit to the number of individuals within the organization that a supervisor can effectively control.

Equally important is the principle of homogeneous assignment which means all functions should be homogeneously grouped and all individuals should be assigned to these groupings in accordance with their abilities and capabilities.

And, last but not least is the principle of delegation of authority. This implies that authority delegated to a subordinate should be commensurate with his assigned organizational responsibilities.

Application of the principle of delegation of authority can normally be determined in part by examination of organization charts and by contacting each supervisor concerning the degree of authority delegated and respective freedom provided for such authority to be exercised.

The General cited the military organization or line organization as one of the oldest and most natural forms of organization. He says this name is a misnomer now as military systems have been subjected to the same modifying influences that have affected industrial and other organizations. Under this system (straight line organization) lines of direction and instruction are vertical, e.g. General Manager, Superintendent, and Foreman. As the responsibilities of the General Manager grew beyond his capacity, he deputized certain of his duties to a superintendent. As the latter, in turn, became over-burdened, he engaged a foreman to assist him, and to administer to departments, the workman being held responsible only to the foreman above him. The lines of authority and instruction run directly

from manager to the foreman to the workers, and all men on the same authoritative level are independent of all others similarly situated.

A foreman receives neither instruction nor command from another foreman, and he can give the same only to those directly under him.

The line type organization alone suffices in industry when composed of small units and when comparatively simple in character. In fact, some rather large plants have been operated successfully on almost pure line organization. However, the General stated that growth in physical size and complexities of operations required the employment of specialists in a consulting or advisory capacity and there developed the system known commonly as line and staff.

In those cases where the duties of the foreman were not the same but each was charged with only certain aspects of the workman's duties, a functional organization developed and the advantages of this form of organization were soon manifest. Special knowledge and guidance were made available to each workman through experts, and not thru foreman just partially educated in several fields. The functional organization's greatest disadvantage was that it tended to become unstable because it weakened the disciplinary or line control, unless there were proper means of coordinating the work of men in the departments. In large enterprises the success of the functional type rests largely on the ability of management to correlate the work of strong personalities. Here then is the combination of line-staff, and functional organization.

The manner in which authority is delegated and responsibility accepted or assigned depends upon the type of organization.

Authority and responsibility in any type organization are inseparable and essential. It is not good policy to keep men in uncertainty as to their position, and when several men are on the same authoritative level, their several fields should be carefully prescribed and their efforts coordinated.

The General stated that a study made by the Stevens Institute of Technology showed that when management men failed - (85 to 90 percent) - it was because of personality factors. They failed to understand the importance of Human Relations. The next most frequent reason was inability to delegate responsibility and with it commensurate authority. In stating that this problem of delegation of authority was as old as human history, the General cited the case of Moses in Biblical times staggering under the same problem. He (Moses) was trying to accomplish by himself the impossible task of governing and judging all the people. His father-in-law, Jethro, observed his methods and saw that he was wrong. He said, "The thing that thou doest is not good. Thou wilt surely wear away both thou and this people that is with thee, for this thing is too heavy for thee; thou are not able to perform it thyself alone."

Jethro then suggested the assignment of duties. In words of the scripture, "Moses hearkened unto the voice of his father-in-law and did all that he had said, and Moses chose able men out of all Israel and made them heads over the people, rulers of thousands, rulers of hundreds,

rulers of fifties, and rulers of tens. And they judged the people at all seasons. The hard cases they brought unto Moses, but every small matter, they judged themselves."

Without appropriate delegation of authority, an organization would have no initiative.

An individual will accept responsibility if he feels that he has, along with it, the necessary authority to carry out that responsibility.

Delegation of authority is a means with which a supervisor makes use of the assistance of others and motivates their efforts.

There are two aspects of this principle which should be considered -1) How it affects a supervisor; and 2) how it affects a subordinate.

The General cited examples of supervisors who over-delegate authority, those who under-delegate it, and those who exercise a sound balance in making delegations. He pointed out that the supervisor who over-delegates authority is usually an individual who has an inherent dislike for responsibility and the obligations it imposes. He seizes every opportunity to do this with all the duties he is charged with. Then when anything goes wrong, he throws up his hands and says, "You can't blame me; it was my subordinates' responsibility." Unfortunately, too often, this type is pointed to as a fine example of executive.

Now the supervisor who under-delegates authority is unable or unwilling to use the capabilities of others. Here, strange as it seems, individuals in this category often are very capable as individual workers, but they have no faith in the ability of others to do as good a job as they would do themselves. They usually have high standards in regard to the details of a task. But here we find extreme weakness which becomes most apparent at the high levels of supervision.

Now the type of supervisor who meets the test is the one who achieves a successful balance by delegating authority commensurate with assigned responsibility. Such supervisors are quick to delegate whenever they perceive the necessity, but they are conscious that there is one thing they cannot delegate, and that is their own responsibilities. They use their own capacities, as well as those of others, to the utmost and measure out authority to the degree necessary to match assigned responsibility.

In the case of a subordinate when authority is over-delegated, he is not controlled and he makes his decisions without having any final responsibility for their results. He becomes what is known as a "free wheeler". In areas where authority is over-delegated one often finds "Empire Building". Here the overall objective is often lost sight of and the leader brings none of the cases to Moses, but judges them all--himself.

In the opposite case, where insufficient authority is delegated, we find subordinates who are afraid of their own shadow. They have no initiative or it is not encouraged, and never know when to make a decision. He brings all the cases to Moses. Sometimes such a subordinate has many things he

can contribute to the organization; however, more often than not, he says, "To Hell with it. If the 'old man' wants to run most of the job, he can run all of it." Where this condition prevails in organization, there is a considerable amount of "wheel-spinning" and objectives are not accomplished.

The General went on to cite the faborable effects where delegation of authority is commensurate with the responsibilities involved. He said that seldom will you find a good balance unless most of the other organizational principles that he discussed have been met. You will also find that they have been reduced, in most cases, to writing so that they can be referred to and so that there will be no misunderstanding and loss of time in discussions of overlapping responsibilities and delegations of authority. In this respect, he pointed out that use of terminology is important--broad generalities lead to confusion and misunderstanding. Putting every detail in writing can be overdone.

Continuing, he said that while authority for doing something may and should be delegated to a subordinate, the responsibility for what the subordinate does, rests always with the superior. The General thought this was one of the most misunderstood principles in the area of this discussion. The fact that a supervisor is being assisted in accomplishing his mission in no way relieves the supervisor of his assigned responsibility in getting that job done. This particular principle should never be used by an executive for failing to delegate authority.

In closing the General stressed two points: 1) The principles discussed should never be regarded as inviolable rules which must be followed to the letter under all circumstances, but should be used as guides to provide sound technique for developing organizations. Compromises are often necessary, depending upon such special circumstances-geographical, political, economic, or logistical. The personal capabilities of the supervisor may be of such extraordinary nature so as to provide for effective operations without strict compliance to basic concepts. 2) Even if the four principles are fully applied, a high degree of unit effectiveness is not necessarily assured. Unit effect may be negated by a host of contingencies--quality and type of equipment and personnel--poor training status, lack of ability or aptitude of leaders.

DISCUSSION

Questions of the participants led the discussion into communications, policy, reporting and inspections. The General cited many examples from his experience to amplify the principles of organization and management. In discussing communications, he cited experiences at the Air Force Finance Center here in Denver. Here he cited three devices he uses to keep informed and the results he used to keep staff and workers informed. 1) Inter-com. P.A. system; 2) Staff meetings; 3) Special technicians and advisors who check on the pulse of his workers. He uses one technician on this basis for every 300 people employed. General Gilchrist was interested in having the right kind of climate in his organization which is conducive to good work.

Several questions and points were brought out in the discussion on diverting influences to good management. These were in regard to public relations press relations, and the complexity of big business (government and private). Many organization problems are employee and supervisor personality problems.

PRINCIPLES OF SUPERVISION

By Foster Hockett, Air Force Personnel Administration School,
Denver, Colorado

SUMMARY

It was stated that a continuous comparison of supervision should be made--comparing yesterday with today and today with tomorrow in order that a determined effort toward supervisory improvement be put forth.

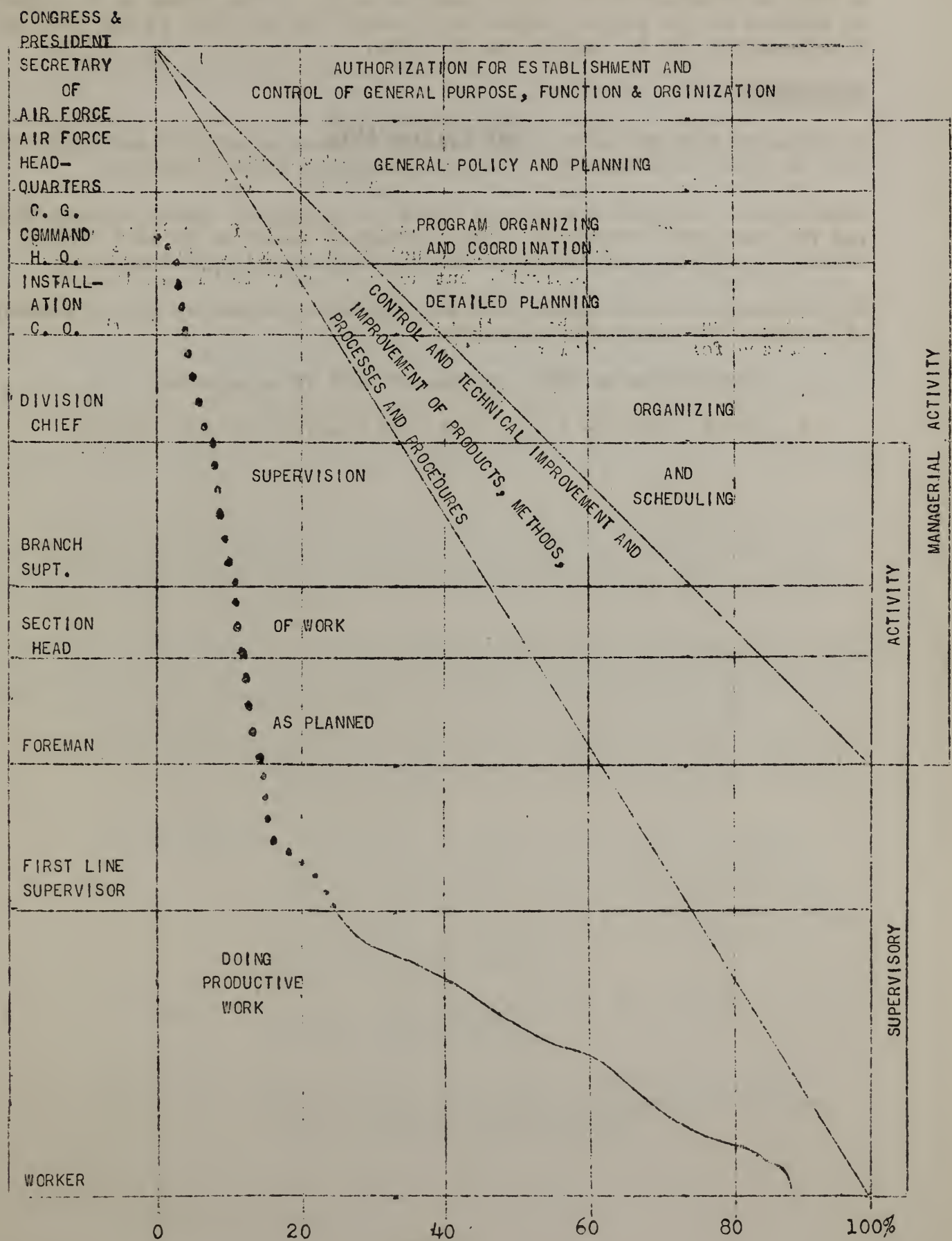
The Concepts of Organization of both Line and Staff were presented as follows: Line, meaning authority and Responsibility, goes directly down to the worker, and Staff, which handles Specialized Functions.

Line	Staff
1. Unity of Command	1. No Direct Command
2. Span of Control	2. Span of Specialized Knowledge or Service
A. Knowledge	A. Time to Keep Informed
B. Time	B. Time to Solve Problems
C. Numbers	C. Time to Give Special Services
D. Space	D. Time to Plan, Complete, and Check Work
3. Assignment of Similar or Related Work	3. One particular Area, Activity, or Function
4. Delegation of Authority	4. Authority of Ideas
5. Accountability up the Line	5. Accountability to Chief

A chart was presented showing the Requirements to Supervise and to Manage, and a close tie-in was shown between them with the thought that a person who is following the requirements to supervise is also following the requirements to manage, but in a lesser degree.

To Supervise	To Manage
1. Laying out the work	1. Projecting
2. Directing or Supervising Workers	2. Planning and Scheduling
3. Following through on the Work	3. Organizing and Staffing
4. Inspecting Production	4. Coordinating
5. Training	A. Controlling
6. Reporting	B. Budgeting
	C. Reporting

A chart developed by the Eastman Kodak Company and adapted to Air Force Civilian Personnel was presented, showing the scope of operations from worker to highest authority.


CONGRESS & PRESIDENT
SECRETARY OF AIR FORCE
AIR FORCE HEAD-QUARTERS
C. G. COMMAND H. Q.
INSTALL-ATION C. O.
DIVISION CHIEF
BRANCH SUPT.
SECTION HEAD
FOREMAN
FIRST LINE SUPERVISOR
WORKER
AUTHORIZATION FOR ESTABLISHMENT AND CONTROL OF GENERAL PURPOSE, FUNCTION & ORGINIZATION
GENERAL POLICY AND PLANNING
PROGRAM ORGANIZING AND COORDINATION
DETAILED PLANNING
ORGANIZING
AND SCHEDULING
SUPERVISION
OF WORK
AS PLANNED
DOING PRODUCTIVE WORK
CONTROL AND TECHNICAL IMPROVEMENT AND IMPROVEMENT OF PRODUCTS, METHODS, PROCESSES AND PROCEDURES
MANAGERIAL ACTIVITY
ACTIVITY
SUPERVISORY
0
20
40
60
80
100%

It was suggested that we all sit down and analyze our activities to see if we are supervising someone who should be under someone else, to be conscious of changes in the job, to occasionally step back and look at the job, and to constantly try to prepare for top jobs.

DISCUSSION

It appeared that too large a gap existed between supervisor and manager and that it would be necessary to do some screening and/or training.

Considerable discussion developed about the method of development in training for managerial positions. The conclusion seemed to be that outside training might be most desirable but not necessary in all instances.

The discussion also brought forth two requisites necessary in the selection of a person for managerial capacity:

1. Qualifications (The length and kind of experience)

2. Merit (Ability to get along and qualities of leadership)

THE HUMAN RELATIONS ELEMENT

By Dr. Jack R. Gibb, Associate Professor of Psychology,
University of Colorado, Boulder, Colorado

Summary: Wilfred Shockley, Entomology and Plant Quarantine,
Denver, Colorado

SUMMARY

Dr. Gibb opened by discussing the effects on the productivity of a worker when he participates in decisions. One group was placed under a junior executive and was given partial freedom in deciding whether they would be paid by the hour, day, or otherwise. They also assisted in the selection of a foreman. A second group had full freedom in selecting the foreman and in the manner in which they were to be paid. The group participating with most freedom in all decisions showed by far the most productivity.

A group which decided to work with bonuses produced more than a group that was told to work for bonuses.

Dr. Gibb was illustrating here that productivity usually increased with the freedom which groups were granted to participate in decisions. He pointed out that many in American business are endeavoring to promote a democratic way of working.

The kinds of leadership or power structure were then discussed by Dr. Gibb. These involve the "who tells whom to do what" relationships and are very important factors in human relations. The kinds of leadership include:

1. Autocratic -- good production under an efficient and respected boss is possible, but generally have an underlying ill feeling.

2. Paternalistic -- this type of leadership is found in German homes, American schools and to some extent in American government. The main drawback is that if the leader passes out of the picture the group or individual is somewhat lost; he must be "psychologically weaned."

3. Anarchical -- everyone does as he wishes. The results are not generally satisfactory.

4. Democratic -- all possible decisions are made by the group. This type has shown the best results in production and morale, experimentally.

Important morale or relations factors include:

Orientation of new employees.

1. Security is produced by an adequate knowledge of required responses.

2. Warmth. Generally speaking the better those in a group know one another the better the morale. On the other hand if there is a very strong leader of a group, then close interrelationships may be a bad morale factor.

3. Participativeness. Morale of any employee is improved when he is permitted to participate in decisions.

DISCUSSION

The early part of the discussion concerned authority of groups without responsibility. Dr. Gibb stated that some very unwise decisions may be made by such a group. Groups, too, should learn to accept responsibility for their actions.

Four ways to measure morale were given:

1. Absenteeism.
2. Number of hours spent on job outside of work hours.
3. Anonymous questionnaires designed especially for this purpose.
4. Job turnover, if high, may be an indicator of low morale.

Mutual criticism between employer and employee is a morale builder. One-way criticism, however, leads to resentment.

Another question discussed was the growing resentment against authority in this country. It was suggested that our individualistic society has lead to this attitude and that in our resentment of government authority the "bureaucrat" has become the scapegoat. Jim Patton's suggestion that government be moved closer to the people, getting it back into a system of group participation, might alleviate this situation somewhat.

Familiarity within a group was brought up. Differential familiarity is dangerous in that accusations of favoritism will develop. Here, again, mutual criticism might be a way out. If a supervisor loves his fellow men then all employees will feel his warmth alike. Whichever policy is taken by a leader, he should be decisive; he should treat all employees alike and show absolutely no favoritism.

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SCOPE OF PERSONNEL MANAGEMENT

By Virgil L. Couch, Deputy Assistant Administrator, Federal Civil Defense Administration, Washington, D. C.

Summary: William D. Mathias, Marketing Specialist, Fruit and Vegetable Branch, Denver Marketing Field Office, Denver, Colorado

SUMMARY

Mr. Couch began his talk with the statement of several definitions.

I.

1. What is management?
   The scientific utilization of men, money and materials in accomplishing a certain objective.

2. Who is management?
   Those who have responsibility for getting work done through others.

3. How is management accomplished?
   Through the planning, organizing, selection of advisors, and delegation of authority, by the managers.

II.

1. What is Personnel Administration?
   The management of people in getting work done.

2. How is Personnel Administration accomplished?
   Generally, through our Civil Service standards plus policies of our own branches given as directives down the line.

3. Where is Personnel Administration?
   a. First; in the heart and mind of the head man.
   b. Secondly; a good specialist in the capacity of Director of Personnel.
   c. Thirdly; a good policy statement in writing to all employees.
   d. Fourthly; in the hands of supervisors, those who manage the people.

   Mr. Couch mentioned that a possible fifth category for II, 3, would be "In the hands of the employees themselves." He further stated, however, that this phase would pretty well take care of itself if the supervisor does his job well.

A good supervisor must basicly know:

1. How to plan.
2. How to organize work.
3. How to get along with people.
4. How to conduct an employee conference.
5. How to plan and conduct a training program.

In developing policies pertaining to Personnel Management, the following employee desires should be kept in mind. We should ask ourselves, "What does the employee want from this job?".

1. Security.
2. Adequate pay.
3. Opportunity to get ahead, on his own.
4. Opportunity to serve a good cause.
5. Opportunity to work for a good boss.
   A good boss is one who is friendly and considerate, and one who is open to suggestions from subordinates. He gives recognition and creates high morale among employees.

The planning of the over-all personnel management program, which includes the defining of responsibility, delegating of authority, coordination and inspection by the personnel officer and the immediate staff to insure an adequate, fully qualified, enthusiastic work force, was broken down into some twenty-four categories by Mr. Couch. Each of the steps listed below is a vital link in Personnel Management Program.

1. Organization - The definition of group responsibilities.
2. Establish jobs - The definition of individual responsibilities.
3. Classification of jobs.
4. Provision of wage and salary scales of each job.
5. Set qualifications for each job.
6. Recruitment.
7. Selection - examinations, trial periods, etc.
8. Placement.
9. Appointment.
10. On the job training - orientation.
11. Set up standards of performance.
12. Performance Ratings.
13. Provision for employee suggestions.
14. Recognition program.
15. Grievances program.
16. Discipline program.
17. Health program.
18. Safety program.
19. Provision for injury compensation.
20. Employee services.
21. Employee counseling and representation.
22. Research.
23. Leave program.
24. Retirement program.

During the discussion period following his talk, Mr. Couch responded to many questions, which further emphasized many of the points brought out in his original presentation.

He stated that any personnel policy should be developed in accordance with the needs and desires of the employees. The employee's responsibility is to help the personnel system grow. In this connection, a point was brought out which stressed the fundamental importance of lines of communication and the necessity of keeping these lines clear, from the head man on down the line to the lowest salaried employee.

One of the many interesting comparisons made by Mr. Couch, brought out the fact that one of our basic problems in government is found where certain misplaced persons are holding high jobs; they have, for one reason or another ceased to produce results required from their high position; and are difficult to get rid of. When comparing this situation to private business, Mr. Couch pointed out that these men could be relieved when business profits fall off due to inefficiency in the various positions; this in contrast to government work, where profit is not a main objective, and cannot be used as a measure of success.

A good personnel officer should become acquainted with all persons under his jurisdiction. He should take a definite interest in the welfare of the employees. However, he should perform his duties anonymously; in other words, he should be able to make things happen without taking personal credit for the job done. Policies should be carried out in the name of the supervisor.

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MANPOWER UTILIZATION

By L. M. Culver, Chief, Inspection Division, Federal Civil Service Commission, Denver, Colorado

Summary: A. A. Gardner, Bureau of Entomology and Plant Quarantine U. S. Department of Agriculture, Denver, Colorado

SUMMARY

Mr. Culver introduced the subject of manpower utilization by reading President Harry S. Truman's letter to Honorable Robert Ramspeck, Chairman U. S. Civil Service Commission, under date of June 8, 1951, part of which is being included in this summary.

"The present emergency has caused great demands on the manpower resources of our country, with shortages of manpower in special areas already being felt. It is extremely important that all possible steps be taken to eliminate these shortages and to assure the availability of manpower for all essential mobilization activities.

"In order to assist the departments and agencies in achieving the results I desire, I want you, together with the Director of the Bureau of the Budget, to issue instructions on steps which can be taken to conserve manpower, and to advise and consult with the departments and agencies on specific problems which they may have in carrying out this program. I am also asking that the Civil Service Commission and the Bureau of the Budget request reports from all departments and agencies and conduct regular inspections and surveys so that reports can be made to me on the progress in conserving manpower, including recommendations for further actions which may be necessary."

Excerpts from Budget Circular A-44 issued jointly by the Civil Service Commission and Bureau of the Budget under date of June 13, 1951 was then discussed. The salient points were as follows:

A. Purpose. Because effective manpower utilization is a critical need at this time, it is essential that each Government agency give special attention to the prevention of overstaffing and nonessential activities and to the bringing about of maximum effectiveness and economy in the utilization of its personnel.

1. Actions to conserve manpower through improved organization, procedures and methods:

a. Study work methods with special emphasis on conserving manpower and use modern business machines where applicable. Use dictating machines, stenographic pool arrangements, and streamlined correspondence methods to reduce the need for stenographic help. Use systematic methods for controlling forms and reports.

B. Actions to achieve the maximum utilization of manpower through improved personnel management:

1. Inform all employees and supervisors of the objectives of the agency manpower conservation program and point out the responsibility of each employee for his cooperation with that program.

2. See to it that the supervisors and technicians responsible for the agency's classification program understand that the agency relies on them for the integrity of position descriptions and that public funds are paid out on that basis.

3. Accelerate your program for simplifying personnel procedures.

4. Match skills and jobs to achieve better use of major skills.

5. Determine the extent to which personnel needs can be reduced by the better use of the skills of employees already on the rolls. Reducing employees' absences and keeping turnover at a minimum.

6. Shape orientation and training activities so as to improve the development of supervisors and of workers already on the job and to get new employees into efficient production promptly.

7. Gear employee relations programs to provide reasonable employee incentives and services.

8. Keep constantly before employees and supervisors the fact that their responsibility for good personnel utilization is a continuing one and that more money and more employees are not the chief means for handling increased workloads.

C. Actions to develop and utilize standards or criteria for determining staffing needs:

1. Actions of the central management agencies: each agency is responsible for taking all necessary steps to carry out a full-scale employee conservation and utilization program. Government-wide leadership with respect to these efforts will be taken by the Civil Service Commission and the Bureau of the Budget, with the Commission assuming the primary responsibility for leadership in the application of the measures listed in Paragraph 3-b. In order to insure that substantial results in conserving manpower throughout the Government are obtained, the Civil Service Commission and the Bureau of the Budget, with the cooperation of the General Service Administration where appropriate, will take the following actions:

a. Provide pertinent information with respect to such measures as are listed in paragraph 3;

b. Conduct inspections or surveys to determine the effectiveness of agency actions and to assist the agency in carrying out its responsibilities for conserving manpower;

c. Review reports submitted in accordance with the provisions of this Circular, and hold hearings as appropriate;

d. Further refine and utilize staffing guides for common services and processes;

e. Identify and distribute information about particularly effective practices found to be in use in the departments and agencies; and

f. Give other assistance as appropriate.

2. The reports of inspections and classification surveys made by the Civil Service Commission and the reports of inspections made by the General Services Administration, together with information available in General Accounting Office audit and investigation reports and in reports of congressional investigations and hearings, will be used both by the Bureau of the Budget in arriving at budgetary decisions and by the Civil Service Commission in making personnel decisions that will insure the use of effective conservation and utilization practices.

Mr. Culver next referred to Chapter A-4, Federal Personnel Manual entitled, "Guides for Determining the Nature and Scope of Agency Personnel Programs."

This paragraph stresses the fact that Personnel Management is the primary responsibility of all who plan, direct or supervise the work of Federal employees. To achieve this responsibility the following essential functions were given:

1. Position Classification
2. Recruitment and Selection
3. In-Service Placement
4. Promotion
5. Employee Performance Evaluation
6. Employee Development
7. Employee Relations and Services
8. Special Incentives
9. Retrenchment
10. Disciplinary Action
11. Processing and Maintaining Personnel Records

It should be remembered that a good job of Personnel Management is a good job of Personnel Utilization.

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President Truman's Letter to Hon. Robert Ramspeck, June 8, 1951
Budget Circular A-44, June 13, 1951
Federal Personnel Manual

TRAINING

By Lee P. Brown, Training Officer, U. S. Department of Air Force,
Lowry Field, Denver, Colorado

Summary: J. R. Dutton, Bureau of Entomology and Plant Quarantine,
Denver, Colorado

SUMMARY

A. A good executive keeps in mind that people are likely to act on desire and emotion rather than reason.

B. A supervisor thrives in an atmosphere of success and withers in one of failure.

1. He hesitates to try something new and is usually content with a satisfactory "status quo."

2. A supervisor's training should begin immediately upon promotion, before untoward or unwanted work habits and philosophy are fixed. This training should start within the first six months' period. If his training is delayed for a year, it is usually too late.

3. You can "crowd" a supervisor by giving him too much training at one time and that is almost sure to make him badly hesitant thereafter.

4. A new supervisor is usually interested in the mechanics of his job; in making it go. He should be led to discover that there is art as well as science in his job. He will never be at his operational best until he gets the "art" angle.

5. The average man in middle management is "on the make" and is afraid of failure. He is inclined to resist training unless it is presented to him in sugar-coated form.

6. Top management officials have "arrived" so that they ordinarily are free to admit that they do not have all the answers and they are willing to accept suggestions and ideas where they find them and to give credit freely.

C. The supervisor and the executive are actually creatures of habit, the same as any other person. Their work habits are capable of development the same as are the habits of any other worker. Their skills, though different, are just as important to them as are the skills of a mechanic to him.

1. The work of supervising and managing is subject to concepts, principles, faiths, and elements, just as is mechanical and technical work subject to laws and rules of science guiding or underlying that work. The supervisory and management work is a science which may not be exact but, in fact, is as exact as any of our present day theories of science pressing on the curtain of the unknown. The supervisor's skills are not exact scientific laws and principles, but management's laws and principles are real and should be known to the executive.

2. The executive should not "press." Like a mechanic under pressure whose fingers become all thumbs, such pressing causes the executive to fumble. This can be disastrous. The executive should be skillful and should have the ability to subsconsciously have his attention flagged by an important detail when it occurs. He cannot, however, watch his staff too closely and pay too much detailed attention to operations, for which subordinates are responsible, without breaking down. The devotion of attention and observation to too great detail causes fatigue.

3. A fatigued executive makes as accurate decisions as an unfatigued one but he gives them more slowly. Some of the most successful executives do not attempt important decisions when fatigued. Executives and supervisors should watch their own health and that of their subordinates and should plan relaxing rest for themselves and those under them. The time so spent in rest and relaxation to avoid fatigue is more than compensated for by avoiding an otherwise certain slow-up.

4. Leadership is relatively rare. A large number of executives will ordinarily include only a few leaders.

5. Supervisors fear change. If what they have works, most of the time, the majority of them are willing to adopt changes only when they are assured that changes will be successful.

6. Most executives will personally do only what they do well and avoid attempting that which they do poorly. They delegate to capable subordinates those things which they do not personally do well. The German Army recognized this and made a practice of complementing an executive with a leader. They supplemented commanders with staff.

D. A good executive will use the scientific approach in his thinking and planning about organization.

1. His role as counselor on human factors is one of the most important duties of the executive who is developing subordinates.

2. Direction, education and encouragement are due the subordinates working under any executive.

3. An executive should encourage his subordinates to do a good professional job. He should develop their administrative abilities so that when the chance for promotion comes, the subordinates are ready to accept it.

4. The process of training and educating subordinates is not a special and separate undertaking. This work should be integrated with the day to day job. Daily work plans should be integrated with the training of employees. It will be as slow as the frequency of opportunity will permit, but it will be solid.

E. The process of executive action is largely the process of narrowing choice. This process is that of an analysis and synthesis in making decisions. Hence the need for an executive to use a scientific approach in his thinking.

1. The questions were raised as to whether managers or executives who had reached that eminence of position should supervise; whether the executive should personally get the feel of the job down below him. In answer, Mr. Brown observed -

2. the manager or executive should know the level just below him. He should know his second flight personnel well enough to pick "promotees" to his executive flight.

3. The executive should not meddle too far down. Such action short circuits the lower organization and confuses it. It was Mr. Brown's conclusion, therefore, that the executive should stay in his field and deal with lower situations through his lower echelon supervisors.

4. Answering the question of whether scientists ordinarily make good administrators, Mr. Brown stated that the administrative scientist is a "buffer" to protect his professional subordinates, enabling them to do their job as unworried as possible by administrative duty.

F. The question was asked whether an assistant should get the same training as the chief he assists. In answer, Mr. Brown stated that the assistant is the chief's other self. A good assistant thinks like his chief who must foster this coordinated thought and action.

1. Too many chiefs spend too much time changing and editing written submissions. This is the work of a GS-5, "Editor", and the boss should refrain from such activity.

2. A good way for an assistant to learn is by observation involving some imitation.

3. The Army and the Navy switch men from line to staff and vice versa so that a man does not lose viewpoint and stagnate. In their organization this has proven a valuable method of rounding personnel.

G. Promotions.

1. Brown noted that if you leave a man in a position too long he is inclined to adjust to the groove and any unused abilities he may have will not be either recognized or utilized.

2. Luck, being in the right place at the right moment, plays about 50% of the part in who is advanced and promoted on too many occasions. This luck circumstance should be replaced by -

3. A real program of courageous recognition, based on a systematic, positive record keeping, to insure no "overlooking" of good past performance. Don't forget "last year's star" in the presence of this year's "hot shot." A good record of employee performance would prevent this error.

4. An organization should have a "system of true appraisal" for study and selection of men. Make a thumbnail sketch of your men and keep a record on them.

5. An appraisal of a man's strong and weak points is basic in right training, as it is, of course, in selecting men for training.

6. You don't train without tools. Where little training is done you will probably see too few tools. No executive or supervisor will train profitably unless he has the tools.

7. Human relations are important to the executive and supervisor.

H. A boss is under observation by his people all of the time. He should make his people participants instead of spectators only, by bringing them out of the stands, so to speak, and making them play. He does this by setting up a good training program and utilizing this training in developing the employees.

1. There are several ways in which a boss can make his "audience" of assistants become "participants." In their training, he should remember that some people are all give and others are all take. The boss, training an assistant in the technique of checking employee performance, can make his check while the person inspected does his work. The subordinate supervisor, accompanying his boss on these check missions, thus is able to observe how to lay out and do work.

2. It has been estimated that 80% of staff thinking is not, expressed. Many of these ideas which never see the light of day have merit. Staff members should be encouraged to express their thoughts. The boss should develop in his people a feeling that they have free and complete opportunity for thinking and expressing their thoughts. The boss should do this, himself. It is a two-way street, requiring open avenues of communication.

3. One of the most important and sometimes vexing jobs of the executive is to keep the channels of promotion open. Most organizations have individuals who have reached their ultimate performance stature and not infrequently these individuals are actually above their proper level. The boss confronted with such a situation, desiring to promote a more able person, finds himself stymied by the occupant of the position being in the way, and may have to ask for the resignation of the blocking man and he must tell him why. The boss should rely on persuasion. He should never reveal his dissatisfaction with the man to that person's assistants. This can only upset morale. Frequently it is possible to help the man and the work too by moving him to a non-supervisory, alternate assignment. If the individual's shortcoming is, for instance, that he is not a good handler of people he can be put on an individually assigned research job and the organization can get fine results from his efforts in this new assignment.

I. Prompted by discussion, Mr. Brown made several concluding observations. Among them were:

1. Practice what you know. Translate your knowledge into lay language which the people you are working with can understand.

2. Technical people can be trained for administrative jobs. Such people are accustomed to planning.

3. Discipline is a method of training. How you apply it is important. Work things out with a problem employee. If a transfer is the solution, try to effect this at grade. In some cases, demotion to a job more appropriate to the employee's abilities is necessary. This should be thoroughly and honestly explained to the person affected.

4. On the basis of accountability, no supervisor has a right to fail without fear of recrimination in any degree. Brown does not hold with those training officers who believe that it is helpful for a supervisor to fail in order to realize his current limitations. Brown thinks it is unwise to set a supervisor up for failure. He advises that no supervisor should be assigned a more severe task than will "stretch" his abilities. To exceed this degree of assignment is to guarantee the supervisor's failure which will in turn breed uncertainty and despondency in the man.

5. When a supervisor, having received an assignment, needs help, give it to him. Do not set him up for a failure. It is much better to try the employee's wings by the "stretch assignment."

J. The psychology of executive training and supervisory training involves an appreciation of the fact that we should invest in ourselves. We indicate when we make no effort toward self improvement that we are not interested in our jobs. A proper training method, honestly applied, can inspire subordinates to make an all out effort in their own interest and in that of the work. This training should not be in the form of doling out sugar-coated pills, but should be well planned and the persons receiving the training should be honestly and courageously delt with.

EMPLOYEE MOTIVATION AND STIMULATION

By Elwood Brooks, President, Central Bank and Trust Company,
Denver, Colorado

Summary: C. L. Snyder, Farmers Home Administration, Denver, Colorado

SUMMARY

From a wealth of practical experience, ranging from early day country school teaching in Kansas to President of the Central Bank and Trust Company Mr. Elwood Brooks made it clear that financial success and an honest desire to serve people go hand in hand.

Banks were originally organized to render service and the old time banker took pride in his contribution to the upbuilding of his community. Through a period of prosperity and easy success, banks, like railroads of the day, became arrogant and were only brought back to a realization of the necessity for service by competition, such as other sources of credit in the case of banks and trucking in the case of railroads.

Mr. Brooks' spoken statements, his attitude and appearance leave no doubt in the listener's mind about his enthusiasm and sincerity of purpose, nor his absolute confidence in his philosophy of human relations with both employees and the public.

The following are the principal points he made in his presentation:

1. Atmosphere necessary to Service. A desire on the part of employees as a group to render service must be started or created by management. Management must honestly radiate some happiness and cheer; grouchy, unpleasant appearance or greetings must be avoided; either rubs off and is soon reflected in others, either building or breaking morale. Management must first have the spirit to serve and enjoy it. This spirit does not just happen, it must be cultivated and continued. A business survey discloses 68% of customers lost to business can be traced to indifference, 54% more than those lost through actual or fancied grievances and more than are lost from all other causes combined.

2. Some Tools which Motivate and Stimulate. The greatest single factor contributing to a proper atmosphere, hence a willingness to serve, is a feeling of security. Using considered judgment, employee participation by discussion and mutual understanding, the Central Bank and Trust Company has initiated several devices to attain its ends.

   A. Recognizing that worry cuts efficiency and multiplies the problems of management, the Bank has established comprehensive insurance plans including added protection for employees on military leave.

B. Pension or retirement plans and presentation of service pins, both based on years of service and following the plan set by government.

C. Through a job evaluation program, which sets minimum and maximum salaries, the earnings of the bank employees are comparable or above those in other lines of business. Along with this, a "cost of living" bonus is computed and paid quarterly. With the adoption of these measures, employees are not affected by wage controls. Results: with enormous expansion of industrial and government activity in this area, no employees have been lost to government agencies.

During one quarter of 1949 the bureau of labor statistics report justified a 5% cut in the cost of living bonus and when applied caused not a single complaint from any employee because they had participated in and fully understood the agreement. A policy of promotion from within the ranks is adhered to and especial effort is made to train and prepare employees for the added responsibilities incident to promotion. Provision is made for recognizing outstanding service in promotion.

D. Employees' checking accounts are handled without the customary service charge. They may borrow from the Bank at less than current interest rates, so are not subjected to the hazard of dealing with other lenders, probably less ethical and certainly less interested in their welfare. These are sound loans having the approval of the department head, following a discussion with the employee of the purpose, the possible accomplishment, and the repayment plan of the loan. This provides safety for the Bank, advice and counsel for the employee. Saving accounts by employees are also encouraged.

E. A social club and lunch room are provided. Equipment, overhead expense, and a portion of supplies are provided by the Bank, with meals served at cost, but all profit from sales accruing to the club. Officers, department heads and other employees share the lunch room and club facilities alike with no attempt at segregation. Employees do not hesitate to talk with bank officers and officers have no fear of friendliness with employees.

3. Service to the Public Based on Same Principles.

A. A liberal policy of cashing checks, in small amounts, for the public is pursued. It is Mr. Brooks' belief that the trained banker should be much more capable of making a proper determination in this matter than the merchant who primarily deals in commodities rather than money. Customary methods regarding identification and obtaining other

pertinent information are used. Losses incurred are negligible when compared with the good feeling engendered among those who are trusted.

B. Balancing restricted interest rates against loan safety and community development, the Central Bank and Trust Company has handled a large volume of Federal Housing Loans. With the rapid growth of Denver, the demand for these loans has exceeded the amount budgeted for them so the Bank has placed over a million dollars of Federal Housing Loans in eastern cities where demand was lighter but accumulated idle capital greater. With no liability the Bank now receives a considerable income for the local servicing of such loans.

Mr. Brooks generously states that the Government is responsible for the establishment of sound appraisal techniques, amortization terms and low interest rates never before recognized as possible or desirable by commercial lending institutions. In addition to safe, profitable business for the Bank, more people are home owners and these are the country's most substantial class of citizens.

C. Piped in background music is provided for employees and customers alike; it greatly increases the efficiency of employees on routine work and is much appreciated by customers who may be detained unusually long during rush hours.

DISCUSSION

During the group discussion following Mr. Brooks' remarks it became clear that the investment and current expenditures involved in carrying out these motivating principles are trivial when compared to the financial returns in increased business and increased employees' efficiency. These are the things that make each employee a good will ambassador for the Bank in and out of working hours.

Throughout his presentation Mr. Brooks expressed a conviction that traditional employer-employee friction is not necessary and demonstrated that a close working relationship of the two groups can be profitable to both.

RELATIONS - PUBLIC AND INTERAGENCY - THE MANAGEMENT PANEL

Members

Dr. Albert H. Rosenthal, Chairman - Director of Public Administration, University of Denver

Kenneth W. Chalmers - State Conservationist, Soil Conservation Service, Denver

Frank H. Ricketson, Jr. - President, Fox-Intermountain Theatres, Denver

Elwood Brooks - President, Central Bank and Trust Company, Denver

Summary: Lewis G. Whipple and Clarke A. Anderson, Forest Service, Denver

Chalmers:

In my opinion, two important points were missed or only lightly touched upon during the current six-day training in Administrative Management Conference:

Lightly touched upon is a dangerous trend whereby John Q. Public sets himself apart from government. Our responsibility as government employees is to do something about this.

Missed was the moral responsibility of government employees to the public. Government employees are public servants.

As you know, the people have a choice in selecting, for example, the bank in which they wish to deposit their money as well as the stores in which they wish to buy their needs. On the other hand, they have no choice in what government requires of them except possibly at the polls. What can government do about this? I suggest the following:

In addition to the requirements of integrity and honesty of all employees we should organize to render efficient and courteous service and continually stress the importance of the best in human relations. All employees should put themselves in the shoes of the taxpaying public; they must be absolutely sincere, and certainly heed a well developed ability to live with others.

In closing, "These are some of the things I believe are wrong with government and what I feel might be done to correct them."

Ricketson:

My recent 25,000 mile trip through seven countries in Europe certainly brought home to me the soundness of our government; it also served to

discourage criticism which otherwise might have been more freely given. I believe that if a thousand educated young Americans of County Agent caliber could be deployed over Europe today, a great deal of benefit to the world would result.

As I have said, I hesitate to criticize, but since I am asked to do so, my greatest criticism today concerns government red tape and (2) the apparent lack of understanding toward the public on the part of many government employees. A better selling job is necessary, and unsuited persons should certainly not be retained in government employment. I disagree that one apple in a barrel will destroy the whole barrel - this does not have to hold true! Cases of fraud so heavily played up by the press will pass if we get rid of both red tape and employees unsuited to public work. It is unfortunate that so little is known regarding the fine work being done by the government and so much is reported of the very few instances where an employee has erred.

In closing I would like to suggest that government conduct more training sessions such as this one in Administrative Management. Successful business is built upon employee participation, criticism, and suggestions. For example, look at the Gates Rubber Company, United Air Lines, and other businesses.

Brooks:

I believe I already had my say when I talked to the group earlier today, but would like at this time to reemphasize employee relations and again endorse participation, particularly at the polls. I cite a survey sometime ago at a Denver Chamber of Commerce meeting which disclosed that only 44% of those present were registered voters and stress that the least anyone can do in a Democracy is vote. I know that government work is difficult but cite benefits to the public while admitting that the public is not as considerate of a government employee erring as it is of the same error in private business.

In closing it is my feeling that red tape can be reduced. I also suggest government should create a proper attitude and a high morale among its employees.

Chalmers to Ricketson:

As a government employee I am much concerned over red tape, a great deal of which is Congressionally imposed, and ask whether Congress shouldn't take a fresh look and eliminate red tape procedures wherever possible?

Answer: They certainly should! As you know, many laws are old and in need of revision - our Postal Laws date back to the time of the Louisiana Purchase - our income tax laws should probably be tied in with state and municipal income tax procedures. In other words, the whole structure of government might be examined to advantage.

Rosenthal:

I mentioned two quotations: "Who will guard the guards?" and "All government is bad because employee X violated public trust", which appearing in the news are adverse and which should be better answered. Government needs a better news releasing mechanism to supply the answers as they are needed.

Shockley:

I have no question but refer Mr. Ricketson to the delay in charge accounts in business as being red tape. In other words, red tape is an item in business as well as in government.

Ricketson:

That may be, but I mention the charge-a-plate principle now in use which has largely overcome this situation.

Rosenthal:

To me this illustrates the greater flexibility of business and emphasizes that government should decentralize more to attain the same end. I agree that the USDA has made great progress but believe more could be made. The big supply houses in business will delay minor purchases--they don't want small retail business. I hope government never gets that way!

Bruce:

I have no question but mention to Mr. Brooks that in our agency we do not have too much red tape. We attempt to apply principals of service to the public.

Brooks:

I do not disagree but cite that the CCC backed up their inspectors but Congress refused to provide necessary funds, and this resulted in the small losses in grain which have recently been played up so big by the newspapers. This loss, by the way, was well within business limits. Every business has to have some red tape.

Reed to Rosenthal:

I understood you to say last week that "with bigness comes less personal contact resulting in red tape."

Rosenthal:

No! I said, "Concentrated bigness." As an example, the Social Security operation is decentralized and handled on the basis of service to public with very little red tape--their understanding of human relationships is working well and is now being copied by many insurance companies.

Millar to Ricketson:

I agree that there is a lack of public knowledge as to what government agencies do, and my question is how to take this knowledge to the public?

Ricketson:

I suggest taking every opportunity to inform groups, such as luncheon and service clubs, etc. We know that Mr. Brooks has done a fine job selling his bank and realize government can do many of the things he has done. The fundamental answer was given by Mr. Bruce. However, the problem is increasing all the time--as an example, the government now handles more insurance than all insurance companies combined. I believe much red tape can be hidden.

Rosenthal:

Much damage is done as we know by widespread and inaccurate criticism. Healthy criticism is valuable but irresponsible attacks are driving individuals away from government service. In foreign lands the prestige of government service is very important--we should work for the same recognition here.

Pubols to Ricketson:

Did you find suspicion of the U.S. in your foreign travels?

Answer: No! I found great respect. Their philosophy is different than ours - in Latin America taxes are negotiated with the government - in France the wealthy do not pay taxes - Europe just doesn't understand us. They feel that with our all-out aid to them we must have a motive. Another item is that problems travel in areas. In other words, government in the Denver area can't take responsibility for government in Washington. We should all look at ourselves carefully and correct shortcomings as discovered.

Reed:

The matter of attitude to government is important and my question to Mr. Brooks is "What can we do to improve the public's attitude toward government? - the attitude of the press?"

Brooks:

I can only point to REA as a great blessing, also FHA. The government has lots of things to sell and all government employees should do the selling job.

Reed:

That could be, but I believe it would be better if the selling were done by the public or press since government employees, in their selling, might be considered as "empire builders."

Ricketson:

I have heard as much criticism of Denver traffic problems as of federal government, so the problem may not be as serious as many think.

Rosenthal:

The University has 13 programs on KLZ entitled, "You and Your Government", one a week for 13 weeks. I would like to ask Mr. Brooks and Mr. Ricketson if they would think over whether private businessmen might not continue such a series? I would not want an immediate reply but would like to get the answers later. The objection of the press to government mimeographed releases is something else for government to consider.

Chalmers:

Cited several examples of unfavorable government-press relations and said whenever possible that it is much better to have the press make their own observations and write their own story.

Rosenthal:

I believe I should cite that less than 15% of the public budget is for administration and that the papers play up waste out of all proportion with actual facts.

Rosenthal:

Closed with Robert Burns quotation.

"O wad some Pow'r the giftie gie us
to see oursels as ithers see us."

EVALUATION OF WORKSHOP

Based on questionnaires prepared, assembled and summarized -
by: G. A. Wright, Chief Accountant, Area Finance Office,
Farmers Home Administration, Denver, Colorado

A Personal Evaluation questionnaire listing eight questions was distributed to all participants the day before the conference closing for completion prior to the last day's session. It was explained that it was not necessary they be signed but an honest and sincere evaluation was desired. There follows a list of the questions and a brief comment on the answers given.

1. Do your duties include any of the management functions discussed in the Workshop?

The answers here were 100% "yes" indicating a good selection of participants was made by the agency heads.

2. Would it be any advantage to you to have periodicals on management topics circulated to you regularly by the USDA library at Albuquerque?

All but three participants expressed an interest in receiving additional printed material. Before the session was closed, the method of obtaining the information was discussed.

3. If asked, what would be your report to your supervisor on this course?

The comments received on this question were highly gratifying. A large number of the participants indicated that they were going to report to their supervisors, that this Workshop was the most beneficial training session they had ever attended since entering Government service. Gratitude was expressed for their having been selected to attend. There follows some of the written comments:

". . . the best training course I have had in the past 17 years. Absolutely worth the time, effort, and money. The course convinced me that some of the things I have been doing as a supervisor are wrong - that other things were right and that some things my bosses told me were wrong, were in fact not wrong."

". . . A very broadening experience, particularly from the standpoint of learning from representatives of other USDA agencies how they handle their administrative problems."

". . . Our own agency should do much of this kind of work instead of concentrating entirely on technical development."

". . . I would suggest that all administrators from the Chief's office down to the supervisory level be urged to take a similar training course, each course designed for the level of participants."

". . . A very stimulating and thought-provoking course which laid bare in my own mind many recognizable inadequacies of myself in the organization of work and supervision of people."

4. How do you expect to apply TAM when you return to your regular job and how do you believe your agency will benefit?

There were several types of answers given here, apparently depending upon the participant's position. As an example, a Rural Electrification Administration representative would necessarily have to apply the principles in a different manner than an individual who would supervise a number of people in a line organization similar to the Area Finance Office of the Farmers Home Administration. Generally, it was suggested that meetings be held with other supervisors reviewing the principles expressed, appraising one's own work and making additional studies into some of the subjects.

A few of the remarks were:

". . . Much of our work is aiding and assisting Cooperative boards of directors (REA borrowers) and their managers in good management. Many of the data and techniques I have learned in this session I can immediately pass on to these people with whom I work daily."

". . . Call a meeting of my section and pass on to them the highlights at least of TAM as it affects them."

". . . My division will benefit from this training which I have undergone to the extent that I can pass along the theory and begin to actually practice the principles learned by me. This will be undertaken promptly."

". . . I expect to start the day I return to work, applying the knowledge gained in this course, human relations, planning, budgeting, analyzing, etc."

5. Rank the 14 subjects in the best order you can; that is, place first the one from which you received the most <u>benefit</u>, and so on. Do not let the consultant or the method of presentation influence your order.

Administrative Leadership, The Broad Perspective of Management, Delegation of Authority and Getting Acceptance of Responsibility were voted among the top few subjects in all cases. Every subject was placed among the first ten in one or more cases, indicating benefit was received from all subjects. One participant said, "This is like asking, 'How would you arrange the spokes in a full wheel?'"

6. What topics do you believe were inadequately covered, and in what way did they fail to meet your need?

Very little severe criticism was received and although some was expressed about particular subjects, it appeared to be the consensus that some benefit was received from all subjects.

7. I believe more workshops (should) or (should not) be held. Why?

There was 100% agreement that more workshops should be held. This, of course, was consistent with the other answers in that since it was beneficial to the participants at this session, it would prove valuable to other USDA employees.

8. I would suggest the following changes if more workshops are held. (Make suggestions as to subjects to be added or deleted, number of participants, type of leaders; that is, more or fewer Government employees, leaders in industry, or professors; length of course, value of the workbook, etc.)

Several indicated that we were expecting too much to believe that a very thorough analysis could be given so soon after completion. It was interesting to note, however, that generally the participants were in agreement with the course as prepared. Some indicated there should be fewer participants and others more. However, no one suggested any more than 30 participants. The consensus seemed to be, if anything, more time should be allowed for each subject rather than cutting the length of the course. Almost everyone was in favor of dividing it rather than running six days straight.

It seemed about equal as to who preferred more leaders in private industry rather than leaders in Government. More than one expressed the opinion that industrial leaders would be much more understanding of Government employees if they attended such a session.

By far, the majority indicated that the Workbook was desirable and helpful.